

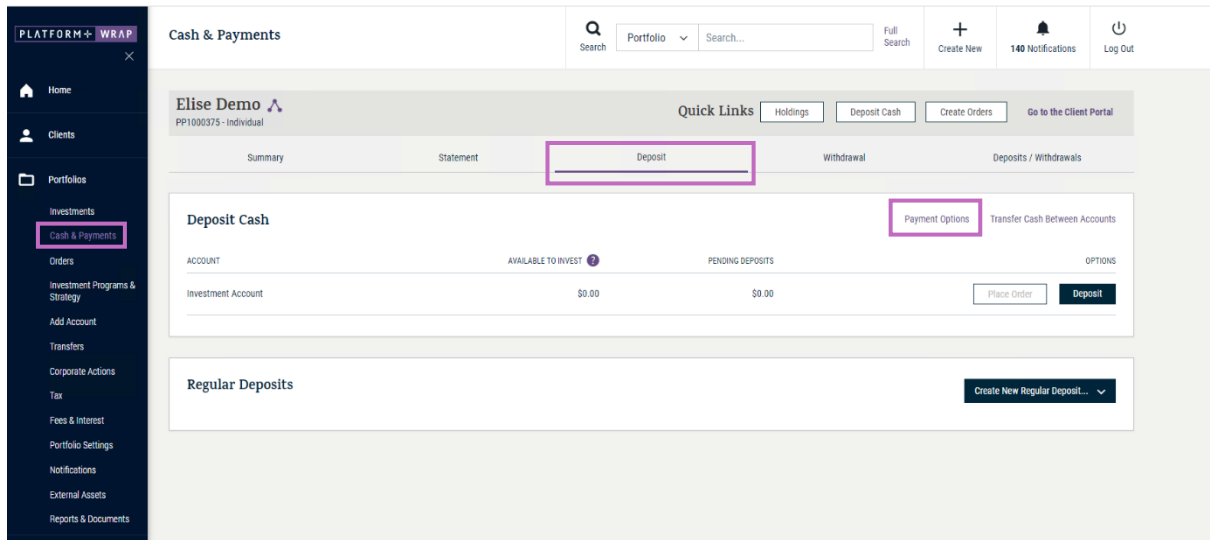
One-off deposits into an Investment account

Adviser guide only.

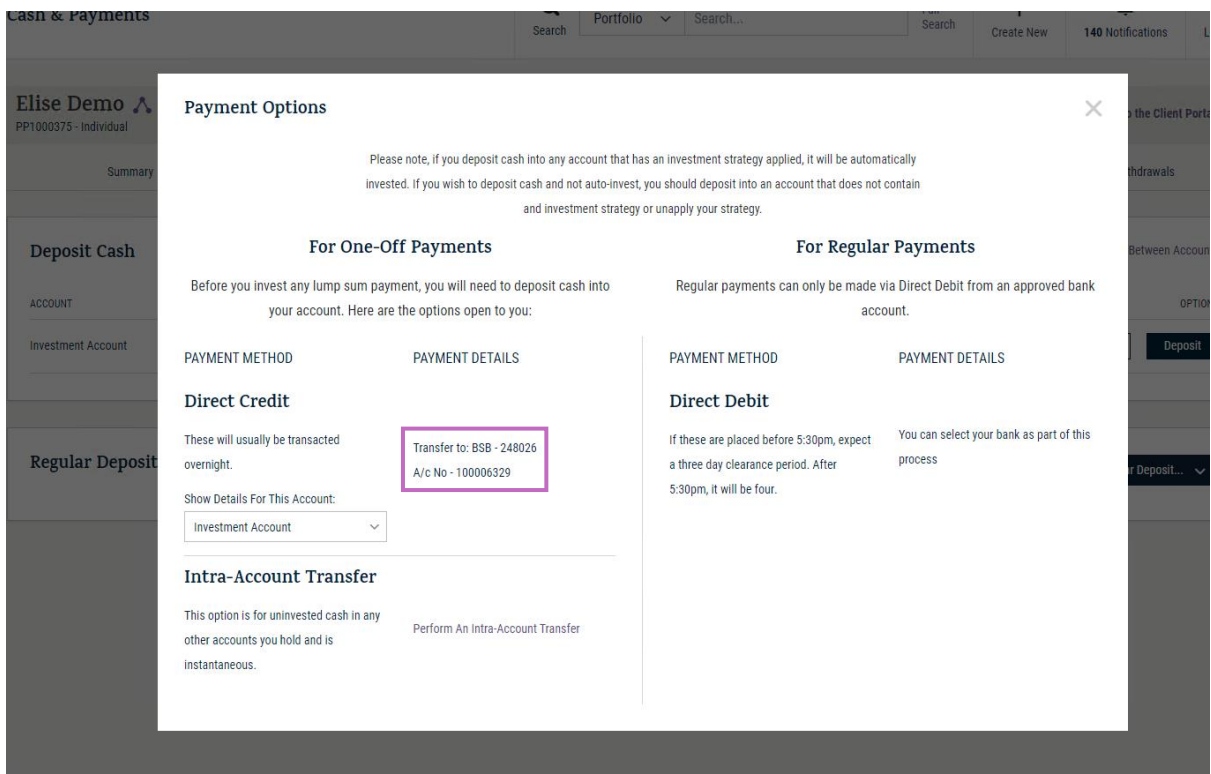
This guide provides instructions on how make a one-off Deposit on an Investment account. You have two options: direct credit or direct deposit.

Direct Credit information:

1. Go to the client [Portfolio](#)
2. Click on [Cash & Payments](#) and then [Deposit](#)

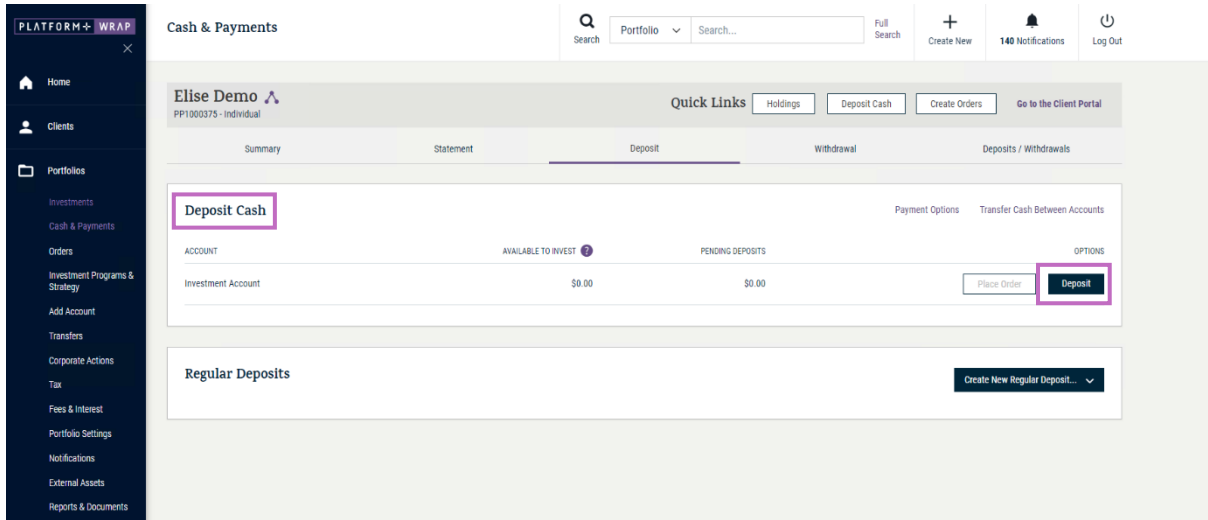


For the bank details for the direct debit click on [Payment Options](#). This will bring up the client’s unique bank account for their account.

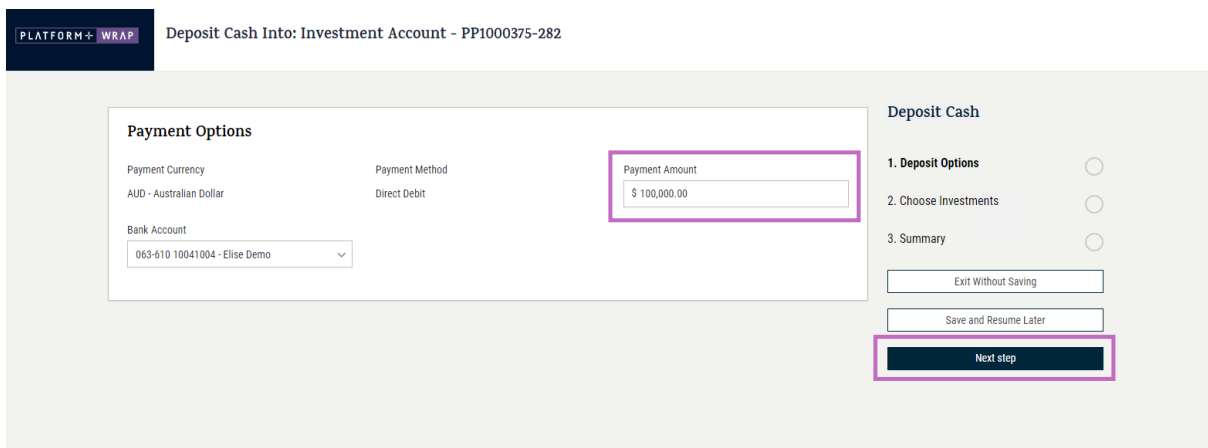


Direct Deposit information:

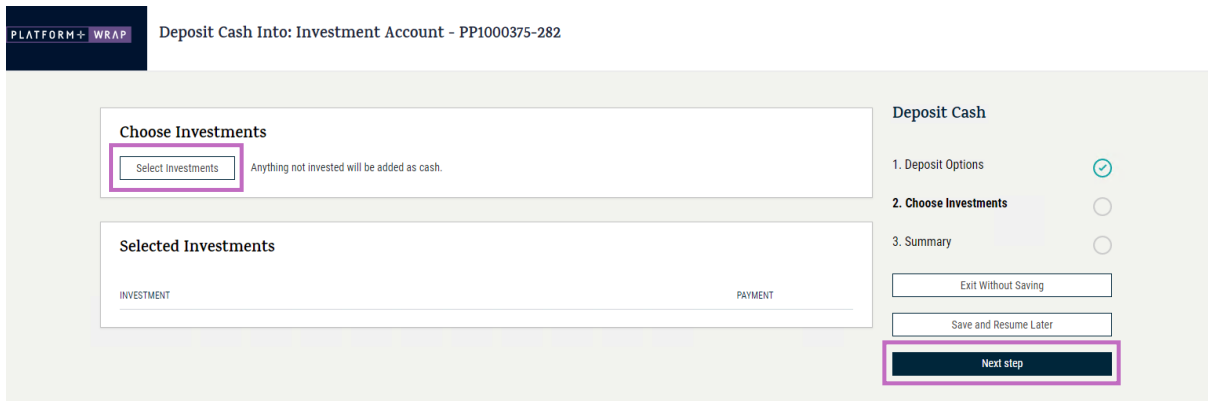
1. In the **Deposit Cash** section, click on **Deposit**



2. Enter in the amount to be deposited and click **Next step**



Select your investments if different or if you are not using the invest excess cash option.



3. Click [Next step](#)
4. Review the data entered and submit the Direct Debit Request

PLATFORM+ WRAP

Deposit Cash Into: Investment Account - PP1000375-282

Please Review These Details Before Submitting

Currency	AUD
Payment Type	single
Payment Method	Direct Debit
Bank Account	063-610 10041004 - Elise Demo
Amount	\$100,000.00
Investment Strategy	N/A
Selected Investments	None

Deposit Cash

1. Deposit Options ✔

2. Choose Investments ✔

3. **Summary** ○

Exit Without Saving

Save and Resume Later

Submit

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Deposit Cash Into: Investment Account - PP1000375-282

i Payment has been successfully submitted and is pending authorisation.

Please Review These Details Before Submitting

Currency	AUD
Payment Type	single
Payment Method	Direct Debit
Bank Account	063-610 10041004 - Elise Demo
Amount	\$100,000.00
Investment Strategy	N/A
Selected Investments	None

Deposit Cash

1. Deposit Options ✔

2. Choose Investments ✔

3. **Summary** ✔

Exit

Your client will then need to log in and accept the Direct Debit Request.

Should you have any questions or require any additional information in relation to this guide, please contact your Financial Adviser or the PlatformplusWRAP Client Support Centre on 1300 168 905 or clientsupport@platformpluswrap.com.au.